

PMUSA

WINSTON SELECT-MARLBORO INTERACTION

- Winston Select's strategy of ^{targeting} current and former Marlboro smokers appears to be successful ^{overall} in the short term.
- Select's smoker profile comes closer to Marlboro (younger, male) than any other Winston franchise.
- Marlboro is underrepresented among switchers to Select and overrepresented among ^{its} alternate brand purchasers.
- Winston Select has shown dual interaction with both Marlboro and the Discount Category, bringing smokers back to Premium Brands.
 - Increased availability of Select free product offers coincided with losses for both Marlboro and, to a greater extent, Discount.
 - Depletion of Select's promotional inventory corresponded with Marlboro's growth and a flattening Discount trend.
 - Select's return to pre-promoted trend may slow Marlboro's short term rate of growth.

Implications

- Select offers Winston its strongest relative access to Marlboro alternate purchasers.
 - Marlboro could potentially have 0.6 - 0.9 share point swing ^{it may temporarily lose} coinciding with future competitive premium price propositions.

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- Marlboro has demonstrated that ^{it may temporarily lose} a 0.6 - 0.9 share points ~~may come into and out of the frame~~ when faced with major competitive premium price propositions.